



# Utah State Office of Education

Improvement Plans  
LEA and School Plan Administrator Guide

WestEd Tracker version 2.8

June 2012

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# Introduction

## Audience

This document describes the setup and maintenance of plans within WestEd Tracker. It is intended for LEA and school Plan Administrators. A separate guide describes the day-to-day use of plans.

## Note

LEA and school plans in Tracker are nearly identical in their functionality and management and are described here generically as "plans." Certain features, such as plan tags and funding sources are inherited by school plans from the LEA plan. These functions are described below.

## Putting Your Plan into Tracker

Your Plan Leadership Team will likely write your plan offline initially. For entering plan information into Tracker, it is recommended that you have an electronic copy of your plan (such as a Word document) rather than a paper version. This will make it easier for you to copy and paste detailed information from your plan into Tracker.

## Plan Organization

Tracker uses a tiered structure for plans: goals, strategies, action steps, and optionally, tasks. You may also create a budget for your plan, and track expenses as you implement the action steps

Goal	<p>A specific, measurable target for students to achieve. States <b>Who</b> will do <b>What</b> by <b>When</b> and <b>How</b> you will know it. (You may write them in SMART format: Specific and Strategic, Measurable, Achievable/Attainable, Results-oriented, and Time-bound.) LEAs may have some goals pre-assigned by the State, and may also add their own, local goals. Schools may select goals from the LEA plan, and re-write them to reflect the school's achievement target, and create their own goals.</p> <p>Title: Maximum 50 Characters    Description: Maximum 1000 Characters</p>
Strategy	<p>A general description of a process an LEA or school will take to reach the student achievement goal. Each goal may have several strategies. What will the district/school do to ensure that the goal is reached?</p> <p>Title: Maximum 50 Characters    Description: Maximum 500 Characters</p>
Action Step	<p>A specific action or activity that will lead to the implementation of the strategy and achievement of the goal. The action step includes a <b>Title, Description, Begin and End Dates</b> plus comments on timelines, persons responsible, costs and budget sources, and an indication if the step is related to professional development (PD). Progress is tracked by updating status, attaching evidence, and adding comments as the step is implemented. Action steps may also be "tagged" for filtered views of the plan, e.g. all steps affecting Special Education students. Each strategy may have several action steps.</p> <p>Title: Maximum 50 Characters    Description: Maximum 1000 Characters</p>

Task	<p>Optional. A specific action/activity that leads to the completion of an action step. Tasks have specific <b>due dates</b>, <b>persons responsible</b> and <b>current status</b>. Each action step may have multiple tasks.</p> <p>Title: Maximum 50 Characters    Description: Maximum 255 Characters</p>
------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

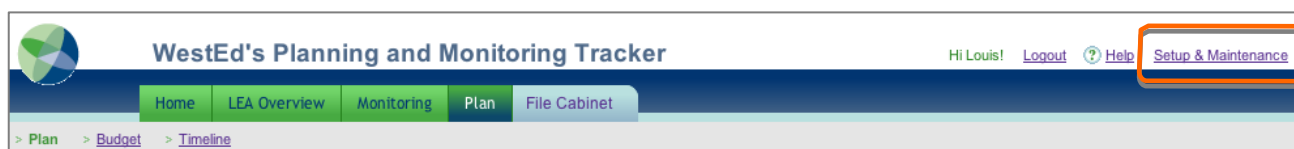
## Preparing for Plan Entry

Plan Administrators must set up certain functional areas in preparation for plan use. This set-up should be done before your team starts entering or significantly modifying the plan, so that all features are available.

### User Set Up

**Note:** LEA or school level users in Tracker may be assigned to one or more organizations, to accommodate users who provide services in multiple LEAs or schools. As a LEA or School administrator, you may only add or change user information specific to your organization; you may not modify information from other organizations, or retire a user who is actively assigned to other organizations.

LEA and school users who are associated with your LEA have access to your LEA and school plans. Users may edit anything on the plan overview, add strategies, action steps and tasks, upload documents and make comments on plan elements. A user may be assigned as a person responsible for an action step or task, and will be able to add budget items, status updates, and other indicators of plan implementation. To add a new user, click the “Setup & Maintenance” link at the top of any page. Only LEA and School Administrators will see this link.



From the Setup & Maintenance menu, select “User Management”. You will see a list of all users currently assigned to your organizations, and can search for users if needed.

Click “Add New User” to send an invitation to a new user.

Current LEA:  
Academic Excellence District

Setup & Maintenance

User Management

Home > Setup & Maintenance > User Management

## CONTACT ADMINISTRATION

Instructions/Description

**FILTER**

[Show Advanced Filters](#)

**User Name**

**Apply** **Clear**

**Assigned Users in Academic Excellence District**

+

Add New User

1

2

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	Name ▲	Organization	Email	Level	Role
<a href="#">Edit</a>	<a href="#">Jane Austen</a>	Academic Excellence District	ecarter+jane@wested.org	LEA	admin
<a href="#">Edit</a>	<a href="#">Lily Bart</a>	Academic Excellence District	ecarter+lily@wested.org	LEA	Read-Only
<a href="#">Edit</a>	<a href="#">Ron Burgundy</a>	Academic Excellence District	ecarter+ron@wested.org	LEA	

To add a user, complete the required fields (First Name, Last Name, Email) and optional fields, if desired. Then select the “Level” (LEA or School) and the appropriate organization from the dropdown lists. Check the “Admin” box if the new user should have administrator privileges.

ADD NEW USER

Instructions/Description

Instructions/Description

First Name\*

5/50

Peggy

Last Name\*

5/50

Olsen

Email\*

14/50

peggy@scdp.com

Phone

515-717-8181

Position

13/100

EL Specialist

Department

14/100

Administration

Level \*

☐ SEA
 ☒ LEA

Academic Excellence District

▼

☐ School

Role

☐ Admin

Create Account

[Cancel](#)

Click “Create Account” to send an email invitation, with a link to Tracker, to the new user. The Level assigned to the user determines their access.

## User Access Levels

### **LEA User**

LEA Users can create plan goals, strategies, action steps, tasks and upload documents to the File Cabinet. LEA Users can also see, comment on, and attach files to school plans in the LEA.

### **LEA Administrator** (Added by the SEA)

In addition to performing all the functions of an LEA User, LEA Administrators have the ability to create new users in their LEA (LEA and school level), create LEA tags, manage goals and add or edit funding sources for the plan. They also have the ability to edit school plans in the LEA.

### **School User**

Where school plans are available, school users may perform all of the plan functions that LEA Users may perform. For LEA plans, school users may upload documents and post comments. They may see other schools' plans, but may not edit them.

### **School Administrator** (Added by LEA Admin or SEA)

In addition to performing all the functions of a School User, School Administrators have the ability to create new users for their school. They can manage goals and add or edit funding sources for the school plan.

### **Read-Only**

A user at any level may be designated as Read-Only. These users may view all information described here, but cannot modify any information within the system. Please contact your State Administrator to request this option for a user.

## User Management

User Management tools allow you to add or change user assignments or roles, and retire or disassociate users who no longer belong to your LEA or school. Select the user name from the list of users to see details of their user account.

**USER DETAILS**  
Description and Instructions for the contact view

**Name** Patricia Principal [Edit](#)  
**Email** lrogner+pat@wested.org  
**Level** School  
**Phone**  
**Position**  
**Department**  
**Read-Only** No

**Invitation Number:**  
[CE7A358C56](#)  
Sent 06/06/2012 by Libby Rognier. Accepted on 06/06/2012.  
[Resend Invitation](#)

[Organization Assignments](#) [Monitoring Assignments](#) [Plan Assignments](#)

[Add Organization](#)

[Edit All](#) [Update All](#) [Cancel Edit All](#)

1

Page size: 25

1 to 2 of 2 items

Remove	Primary	Organization ▲	LEA	County	Level	Role
<a href="#">Remove</a>	<input checked="" type="checkbox"/>	Aloha Elementary - 19642126010862	ABC Unified - 19642120000000	Los Angeles - 19	School	admin
<a href="#">Remove</a>		Carmenita Middle - 19642126066708	ABC Unified - 19642120000000	Los Angeles - 19	School	admin

1

Page size: 25

1 to 2 of 2 items

To assign the user to more than one of your organizations, use the Organization Assignments tab and click “Add Organization” to see a checklist of potential assignments. Select all or individual organizations, select the user level for each, and click the “Associate Selected Organizations” button.

**UNASSIGNED ORGANIZATIONS - 3 ORGANIZATIONS**  
*Academic Excellence District*

[Select All](#) [Associate Selected Organizations](#)

1

Page size: 25

1 to 4 of 4 items

Select	LEA ▲	Identifier	County	Select
<input type="checkbox"/>	aa California Test District	22222	Maricopa County - 344	<input type="radio"/> Admin <input type="radio"/> User
<input type="checkbox"/>	aa New Mexico Test District		Coconino County - 340	<input type="radio"/> Admin <input type="radio"/> User
<input checked="" type="checkbox"/>	Academic Excellence District		Pima County - 347	<input checked="" type="radio"/> Admin <input type="radio"/> User
<input type="checkbox"/>	Ace Test District	45454545	Apache County - 338	<input type="radio"/> Admin <input type="radio"/> User

To remove access to your organization from a user, click the “Remove” link on their organization assignments list. If a person is associated with more than one organization, you may select a primary organization for the user, if you are an administrator for each of that

user's assigned



organizations, which will appear with their user name in comments and user lists. Click the Edit link on the user's profile to select the primary organization.

To change the user's role between User and Admin, click the "Edit All" button above the Organization Assignments list, then use the radio buttons to select the role. NOTE: you will only be able to change the role for those organizations you have administrative access to.

<a href="#">Edit All</a> <a href="#">Update All</a> <a href="#">Cancel Edit All</a>				
<div> <div> <div>⏪</div> <div>⏩</div> <div>1</div> </div> <div> <div>Page size:</div> <div>25</div> </div> <div>1 to 2 of 2 items</div> </div>				
Remove	Primary	Organization ▲	County	Level Role
<input checked="" type="checkbox"/>		aa California Test District - 22222	Maricopa County - 344	LEA <input checked="" type="radio"/> Admin <input type="radio"/> User
		Academic Excellence District	Pima County - 347	LEA <input type="radio"/> Admin <input checked="" type="radio"/> User

## Retire a User

When a user has left your organization, or changed roles, you may wish to retire them from active access to Tracker. If the person is still active in organizations you do not have administrative access to, you will not be able to retire them, but you may remove the association with your own organization(s).

To retire a user from the system, view the user's profile and click the "Edit" link. Click "Retire" on the Edit page. View the warning and confirm.

### EDIT USER

Description and Instructions for the contact edit

Complete all required fields. Add Position, Department and Phone Number, if known. All contact information is displayed in the system to other users for reference.

**First Name\*** 5/50

**Last Name\*** 7/50

**Email\*** 21/50

**Phone**

**Position** 0/100

**Department** 0/100

**Primary Organization**

No Primary Organization

**Invitation Number:**  
20C304CBEA

Sent 04/27/2011 by Tommy Lasorda. Accepted on 04/27/2011.

[Resend Invitation](#)

**Login usernames:** ecarter+75@wested.org

**Last Active:**  
06/05/2012 5:34 PM  
[View activity](#)

☐ **Read-Only**

Setting a user as Read-Only prevents them from accessing Setup & Maintenance. Their ability to browse elsewhere is unaffected, but they cannot add comments, change files, or make any other changes. You cannot make yourself Read-Only.

[Save Changes](#)
[Delete](#)
[Retire](#)
[Cancel](#)

Unable to delete this item because it is associated with other items in the system



Retiring a user will remove all associated organizational associations from the user account, including **all** monitoring and plan roles. Any activity tracked by the system will continue to be displayed for a retired user (such as recorded actions on the Instrument Status History or the File Cabinet's information about who uploaded a document) but the user's previous monitoring and plan roles will not be displayed anywhere in the system: the user profile or the monitoring or plan assignment and display pages. Adding an organization association to the retired user record will reactivate a retired user. This will **not** reinstate any previous monitoring or plan roles.

Removing all organization assignments from a user will also place them in the retired users list.

The retired user will no longer be able to log into the system and will not be listed as available when assigning monitoring or plan roles. Retired users may not receive emails from the system, even for areas of the system where they were previously assigned.

To view retired or unassigned users, use the "Show Retired" filter on the User Management list.

Home > Setup & Maintenance > User Management

## CONTACT ADMINISTRATION

Instructions/Description

**FILTER**  
[Hide Advanced Filters](#)  
**User Name**  
  
**Levels**  
All Levels ▾  
**User Role**  
☒ Show Retired ☐ Admins Only

To reinstate a user, add a new organizational association to the user account. You may modify the level of the account as needed.

## LEA Tags

In addition to the plan tags created by the SEA, the LEA administrator may create a local set of tags, available in LEA and school plans to support plan management and implementation needs.

To add local tags, click the “LEA Settings” link on the LEA Overview page:

The screenshot shows the LEA Overview page for Academic Excellence District. The navigation bar includes Home, LEA Overview, Monitoring, Plan, and File Cabinet. The LEA Overview section has a sub-header with a dropdown menu for LEA Settings, which is highlighted with an orange box. Below this, there is a section for Monitoring with a list of instruments: Annual Submissions, Cycle 1, Cycle 2, Cycle 3, and Cycle 4, all marked as In Progress. To the right, the LEA Plan section shows the LEA Plan Overview, last updated by Don District on 09/08/2011 at 3:49 PM. It also shows the status as In Progress with 20% progress. Below this, there are two goals: Reading/Language Arts Proficiency and Mathematics Proficiency, both marked as Accepted.

You will see a list of LEA Tags already created, as well as a list of all SEA tags as reference. To see a full description of the tag, hover over the tag name.

The screenshot shows the LEA Plan Tags management page. It features a table with columns for EDIT, DELETE, SORT ORDER, COLOR, SHORT NAME, LONG NAME, DESCRIPTION, and RELATIONSHIPS. The table contains one entry for a tag named "Gates" with a color of orange. To the right of the table, there is a help text box explaining that this management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags. Below the help text, there is a list of State Tags: PD, ELL, SPED, Eval, IndianEd, SIG, and Tech, each with a corresponding colored box.

EDIT	DELETE	SORT ORDER	COLOR	SHORT NAME	LONG NAME	DESCRIPTION	RELATIONSHIPS
		1		Gates	Gates Grant	\$10,000 for enhanced reading program for our upper grade non-readers	0

**State Tags**  
These are existing State Plan Tags that are available. Do not duplicate these tags with new LEA Tags.

- PD
- ELL
- SPED
- Eval
- IndianEd
- SIG
- Tech

Click “Add a New Tag” to create additional LEA tags. The sort order is numeric, and values of 1-8 also determine the color of the tag. Tags with sort values higher than 8 appear grey in color. The short name field may be up to 10 characters, no spaces, and appears in the tag icon throughout the plan. The long name and description fields appear when hovering over the tag label anywhere in the plan.

### LEA Plan Tags

[Add a New Tag](#)

EDIT	DELETE	SORT ORDER	COLOR	SHORT NAME	LONG NAME	DESCRIPTION	RELATIONSHIPS
<div> <div>Sort Order</div> <input type="text"/> </div> <div> <div>Short Name: *</div> <div>The maximum length for Short Name is 10 characters.</div> <input type="text"/> </div> <div> <div>Long Name: *</div> <div>The maximum length for Long Name is 30 characters.</div> <input type="text"/> </div> <div> <div>Description:</div> <div>The maximum length for Description is 255 characters.</div> <input type="text"/> </div> <div> <input type="button" value="Insert"/> <input type="button" value="Cancel"/> </div>							
		1		Gates	Gates Grant	\$10,000 for enhanced reading program for our upper grade non-readers	0

**This management page allows LEA Admins to create LEA Plan Tags to be used in addition to State-created Plan Tags.**

**State Tags**  
These are existing State Plan Tags that are available. Do not duplicate these tags with new LEA Tags.

- PD
- ELL
- SPED
- Eval
- IndianEd
- SIG
- Tech

Click “Insert” to save your tag and add it to the LEA tag list. You may also edit any existing LEA tags by clicking the pencil icon, or delete a tag by clicking the x, or delete icon. You can assign multiple SEA and LEA tags to any action step. However, only up to 8 of each type of tag will show on the Plan Overview for an action step. Both sets of tags will show in the filters on the Plan Overview.

Tags:

SEA

☐ -- Professional Development
 ☐ -- English Language Learner
 ☐ -- Special Education
 ☐ -- Monitoring and Evaluation Step
 ☐ -- Indian Education
 ☐ -- SIG Indicators
 ☐ -- Technology

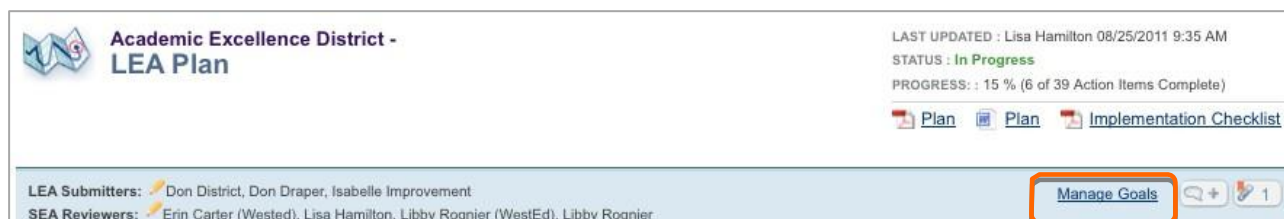
LEA

☐ -- LEA 1st Priority Step
 ☐ -- LEA 2nd Priority Action Step
 ☐ -- Gates Grant

## Add/Manage Goals

The state may pre-assign goals and strategies to your plan. You may add a description to each to fit your local needs and create additional strategies under a goal, but you cannot remove the assigned components from the plan.

Plan Administrators may add new goals to the LEA or school plan. All users can edit existing goals, and add strategies, action steps and tasks. To add a goal, click the “Manage Goals” link on the plan overview. If you are not an Administrator, you will not see this link.



**Academic Excellence District - LEA Plan**

LAST UPDATED : Lisa Hamilton 08/25/2011 9:35 AM  
STATUS : **In Progress**  
PROGRESS : 15 % (6 of 39 Action Items Complete)

[Plan](#) [Plan](#) [Implementation Checklist](#)

LEA Submitters: Don District, Don Draper, Isabelle Improvement  
SEA Reviewers: Erin Carter (WestEd), Lisa Hamilton, Libby Rognier (WestEd), Libby Rognier

[Manage Goals](#) [1](#)

On the Manage Goals page, you will see a list of current goals in your plan and a list of available state goal templates. Goal templates are created by the SEA and contain pre-defined resources, evidence and strategies. You may edit the current goals, add a state goal template, or add a new goal. You may also re-order goals to determine how they appear in your plan.

The Origin column indicates at what level the goal was first entered into Tracker. If the state created goals that are auto-assigned to your plan, the origin will be SEA. If you edit a state-created goal template, you will be able to customize the description, but may not change the title of the template. If you add a new goal, the origin will appear as LEA for LEA plans and School for school plans.

Manage Goals		
GOALS USED IN MY PLAN		
		<a href="#">Reorder Goals</a> <a href="#">Add a new Goal</a>
Origin	Title	
LEA	<b>SIG Goal</b> This is the SIG Goal in my school plan	<a href="#">Edit Goal</a>
SEA	<b>Technology Literacy</b> Students will be technologically literate in the areas of telecommunications/Internet, word processing, multimedia presentations, and the social/ethical aspects of technology.	<a href="#">Edit Goal</a>
SEA	<b>Student Safety and Fitness</b> Establish a program of fitness and safety courses including team and individual sports, nutrition and food preparation, personal and public health instruction.	<a href="#">Edit Goal</a>
TEMPLATE GOALS		
Origin	Title	
LEA	<b>Technology Literacy</b> New Goal 1 for Length of OVW	<a href="#">Add to School Plan</a>
LEA	<b>Parent and Community Participation</b> Parent and Community Participation	<a href="#">Add to School Plan</a>

The state may retire goals that were assigned to LEAs or schools in previous years. If so, the retired goals, with their associated strategies, action steps and tasks may be viewed by selecting the “Retired” filter on the plan overview. You may reactivate retired plan elements from this view.

Show All Statuses All Funding Sources All SEA Tags All LEA Tags [Clear Filters](#)  
All Assignments All Updates **Retired** ☐ Requires PD

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▼ [Collapse Outline](#)

<b>Goal</b> <b>RETIRED</b> <a href="#">Proficiency in English for ELLs</a>	<b>STRATEGIES:</b> 1, 1 Incomplete	<b>ACTION STEPS:</b> 0 of 1 Complete <span>1 Overdue</span> <b>TASKS:</b> None	Budgeted: \$11,600.00 Actual: \$900.00	<input type="button" value="0"/>
-------------------------------------------------------------------------------	---------------------------------------	-----------------------------------------------------------------------------------------	-------------------------------------------	----------------------------------

STATUS: In Progress 09/12/2011 [Status History](#)  
 All English learners will make progress in learning English as measured by the State English Language Development Test. Eighty percent of Beginners will move to Early Intermediate; 50% of Early Intermediate will move to Intermediate; 50% of Intermediate will move to Early Advanced; Early Advanced/Advanced will become English proficient. No students will regress.  
 SEA Resources available: 2

Click the goal name, then click the “Activate” button on the Edit Goal page to add the goal back to your active plan.

Once your goals and strategies are added, your team will want to add detailed action steps and tasks, specifying who will do what, by when, what it may cost, and which funds will support it.


## Add Funding Sources

The Plan Administrator is responsible for adding funding sources and related allocations to the plan budget. These sources are then available for assignment to budget items throughout the plan.

From any plan page, click the Budget link at the top to see the overall plan budget. LEA or school Plan Administrators will also see the “Add Funding Source” link.

[Plan](#) **Budget** [Timeline](#)

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**Excellence Elementary School**  
**School Plan**

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**Budget**

Show 2011 - 2012 School Year

PROGRAM	SOURCE	LEA BUDGETED ALLOCATION	UNENCUMBERED	TOTAL
No records to display.				
<b>TOTAL</b>				

Plan Administrators may select Federal or State funding sources added by the SEA. Plan Administrators may also create local funding sources that are available in LEA and school plans. On the Add Funding Source screen, select SEA or LEA to add a new source. SEA funding sources will allow you to select from a dropdown list of all available Federal and State sources. (NOTE: If you have already added a source to your budget, you may edit it on the budget overview page. It will no longer appear in the drop-down list.) An LEA funding source requires a title and short title (up to 20 characters for display) as well as funding amounts. School Plan Administrators will select from a single dropdown list of funding sources designated by the LEA.

Funding Sources include optional carryover and indirect amounts. The available allocation is the sum of the total funding plus carryover minus indirect. This amount appears in the total allocation column in the plan budget. You may click “Calculate” to verify the amount before saving the record. These fields may be edited at any time.

**Add Funding Source**  
Enter each funding source and amount of funding available to your district. This will help you build a budget for your specific actions.  
\*=required information

☐ SEA ☒ LEA

Year\*  
2011 - 2012 School Year

Title  
Gates Literacy Grant

Short Title  
Gates Grant

Total Funding\*  
10000

Carryover

Indirect  
500

Available Allocation  
9,500.00

Save

Calculate

Cancel

Funding sources are immediately available for assignment to budget items.